

COVID-19 Community Team Outreach Tool

Digital Exposure Notification for Contacts in CCTO



This job aid covers automatic digital exposure notifications for contacts who are entered into CCTO. (Contacts who flow into CCTO from NC COVID will be sent a notification as soon as they enter CCTO with required fields correctly completed per the specifications below.)

Automatic digital exposure notification (as shown in the [Digital Outreach Samples doc](#)) is a helpful contact tracing enhancement that serves two purposes:

1. It **enhances existing workflows** by quickly helping contacts to learn of their exposure, to receive and share key info, and to begin accessing digital assessments. This expedites initial outreach but **will not prevent you from monitoring your contact normally or from contacting them by phone if needed.**
2. Depending on your local guidance, sending an exposure notification **may also take the place of an initial phone call** and/or of **ongoing monitoring**; this supports prioritizing contact tracer time for the contacts most likely to have and spread disease.

Sending a Digital Exposure Notification

1. Contacts will receive a digital exposure notification automatically upon saving the monitoring event (ME) if required fields are complete. Confirm **that you have completed and checked** these fields:

- **Contact or Case Patient**
- **First Name, Last Name, State, and County** (required CCTO fields)
- **Last Date of Exposure to Source Patient #1**
- **Email AND/OR Primary Phone** (notifications will be sent to any provided method(s) of contact)

The notification will include an **end-of-quarantine date** (calculated as 14 days from the contact's most recent last date of exposure, regardless of any date entered manually in "Monitoring End Date") and a **test date** (5 days since the most recent last date of exposure).

NOTE ABOUT MINORS:

While minors may receive a digital exposure notification, **contacts must be 18 years of age or older** to provide information through the digital portal. *Parents or guardians can submit digital monitoring information on behalf of minors.*

Complete and check key fields

Hovering over **Last Date of Exposure to Source Patient #1** will present a message reminding you to use Case Interview Date if Last Date of Exposure is unknown.

1

Complete and check key fields

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2. When these required fields have been completed and saved, a **digital notification will be sent automatically to any method(s) of contact provided**. Note that the **"Send Notification?"** toggle will move to **"Yes"** on its own as soon as the required information is entered, and the notification will send as soon as you save. No other action is required on your part. If information is removed from the required fields, **"Send Notification?"** will move to **"No."** *If you wish to re-send a notification, you must first save with the toggle set to "No," update any required fields, reset the toggle to "Yes," and save again (see right).*
3. You can confirm that a text and/or email was created by visiting the contact's **All Activities Page** and confirming that an email and/or text is visible. Additionally, the notification will be displayed in the **Assessments Page** as an entry marked **"Notification."**
4. You can also review whether a **text message** notification created was confirmed to be delivered or undelivered to a mobile phone number by reviewing the fields for **"Most Recent Text Notification Status"** and **"Most Recent Notification Status Date."** These fields will only update once per text; therefore, texts labeled as **"Sent"** or **"Queued"** were not yet delivered at the time in **"Status Date,"** but still may have been subsequently delivered. See *next page for a full explanation*.

2

Save your work

3

Confirm outreach/notification creation

4

Review text message status

CRITERIA FOR SENDING OR RE-SENDING A NOTIFICATION:

1. **Send Notification?** is set to **"No."** (If re-sending, this change must be saved.)
2. **Phone/Email** and **Last Date of Exposure** are completed and there is a change to one of these fields (*including the initial change from blank to filled*) to move the toggle to **"Yes."** *To re-send a notification if no changes have been made, the toggle must be moved to "Yes" manually.*
3. **Changes are saved.**

TIP: Auto-save, which can also trigger a notification being sent, occurs after 30 seconds of inactivity. Be sure to check required fields carefully.

For contacts flowing from NC COVID, notifications send automatically between 8AM and 7PM only. Notifications sent for these contacts outside this window will be sent first thing in the morning.

2

Save your work

3

Confirm outreach/notification creation

4

Review text message status



Checking Text Notification Status in Contact Views

You can see the **Text Notification Status** field as a column in monitoring event system views. To check most efficiently for which of your county's contacts did not receive a text notification:

1. Select the **All Contact Monitoring Events** view and filter the **County** column by your county name.
2. The **Created On** column in this view is already **automatically** sorted by newest to oldest, so the most recent contact monitoring events will appear at the top of the list.
3. In this filtered view, you can review the **Most Recent Text Notification Status** column in order to find recently imported contact monitoring events for which a text notification was **"Failed," "Undelivered,"** or **Blank**. These contacts did not receive a text notification (though they may have been sent an email notification), and they may require further attention.

1

All Contact MEs View

2

Created On

3

Text Notification Status

4-All Contact Monitoring Events					
Create...	Address 1	Phone #2	Contact or ...	County	Local He
10/7/2021...	NC	---	Contact	Dare	Dare
9/15/2021...	NC	---	Contact	Dare	Dare
9/7/2021 ...	NC	---	Contact	Dare	Dare
9/7/2021 ...	NC	---	Co		

All Contact MEs View

4-All Contact Monitoring Events					
Ethnicity	Race	Send Notifi...	Most Rece...	Most Rece...	System Firs...
---	---	No	---	---	---
---	---	Yes	9/7/2021 ...	delivered	9/7/2021 ...

TEXT NOTIFICATION STATUS DEFINITIONS:

- **Delivered:** Text successfully delivered.
- **Sent:** Text sent but delivery unknown as of timestamp. ***SEE NOTE**
- **Queued, Sending, or Accepted:** Text not yet sent as of timestamp. ***SEE NOTE**
- **Undelivered or Failed:** Text unsuccessful, likely due to the number being a landline.
- **Blank:** No text created.

***NOTE:** **Text Notification Status** only updates one time; therefore, texts labeled as "Sent," "Sending," "Accepted," or "Queued" were not yet delivered as of the timestamp shown in **Status Date** but likely were delivered.



1. Contacts will receive a text or email message **that informs them of their exposure and their personal quarantine dates (see [appendix](#) and [Digital Outreach Samples](#))**. It will also provide them with a **link to a digital portal landing page** with more details and testing info. Clicking **Next** at the bottom of this landing page takes contacts to a list of next steps.
2. Contacts who click **Next** again will be asked to agree to participate in digital monitoring.
3. Contacts who opt in will then be asked **to provide the same personal, contact, and demographic info that they would provide on a normal initial outreach call**. *First Name, Last Name, DOB, State, County, and Email/Mobile Number (depending on Preferred Method of Contact) will be required.*
4. When contacts submit this form successfully, they will start to receive daily digital assessments via their preferred method of contact **until the end of their monitoring period as determined by the date in "Monitoring End Date."**

4 Contact submits form and monitoring begins

Depending on your LHD's workflow, **contacts who complete these steps may or may not proceed to additional monitoring via phone.**

Contact submits form and monitoring begins

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Reviewing Information Gathered from an Exposure Notification

1. If your contact has provided information in the portal, you will see that **"Last Assessment Date"** has been updated on their event.
2. To see the information that your contact has provided in detail, click into their **Assessments Page** and review the assessment marked **"Notification."**
3. You can review information that your contact has provided against the information that was originally in their monitoring event by selecting the **"Notification Contact Info"** page at the top of the assessment.
4. The boxes marked **"Contact Provided"** show your contact's responses, and the boxes marked **"Original Contact"** show what was originally in their monitoring event.
5. If your contact entered a last name that matched their last name in CCTO exactly, **"Monitoring Event Updated?"** will be set to **"Yes,"** and all new or changed information that they have provided has been updated automatically on their monitoring event. If your contact's last name did not match exactly but you believe the information should still transfer to the monitoring event, please proceed to the next page.

1. Last Assessment Date: 9/10/2021 4:23 PM

2. Barbara Roberts
Monitoring Event - MDA Form

3. A-0001648331
Assessment

4. Contact Info Provided Through Digital Notification

5. Preferred Method of Contact: Email

NOTIFIED CONTACTS WHO DO NOT RESPOND:
A **Final Monitoring Outcome** for "Notification - No Response" is available for contacts who were sent a notification but did not complete any assessments. Please defer to your local protocol and defer to the Closing Out A Contact [job aid](#) for support.

NOTE: DEMOGRAPHIC INFO WILL NOT TRANSFER
Due to inefficiencies with the system, contact-provided demographic info will not automatically transfer onto MEs; however, you can still review this information and update these fields manually.

1. Review "Last Assessment Date"

2. Open assessment marked "Notification"

3. Click "Notification Contact Info"

4. Review "Contact Provided" Info

5. Review "Monitoring Event Updated?"

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Handling Incorrect Mismatches on Notifications

You should only complete this process if explicitly instructed to do so. Check with your supervisor on local protocol.

A **mismatch** occurs when the last name that a contact submits in the digital portal does not match their original last name in CCTO (either in spelling or in upper/lowercase), and this stops their monitoring event (ME) from updating automatically. If you believe the submitted info should **still be paired** with the ME, however, you can correct this:

1. If the last name that a contact entered in the digital portal does not match their original last name in CCTO, **"Monitoring Event Updated?"** will be set to **"No"** because the Tool considers this a mismatch. This means any info that they provided **did not** automatically transfer onto their ME.
2. Events labeled as a mismatch can quickly be identified and reviewed by selecting the view for **"Notification - Contact Event not updated"** in the Assessments Tab.
3. If you have determined that an entry on this view is **not a true mismatch** and that the contact's **ME should be updated** with the info submitted, you can use a **flow** (automatic workflow) to do this in one step. After selecting your event(s) from the view, click **"Flow"** at the top of the screen.

1 "Contact Updated?" is set to "No"

2 "Notification - Contact not updated" view

3 Select contact(s) and click "Flow"

TRUE MISMATCHES:

Notifications received by the wrong person

- If "Contact Updated?" reads "No" and you have determined that the notification was received by the wrong person, **consult with your supervisor**.
- A field has been provided for **"Reviewed & wrong person"** that you may use to document this, but you should always discuss documentation and next steps with your supervisor.

1

0001652913

Assessment

Notification Contact Info Suggested Exposures System In

Contact Info Provided Through Digital Notification

First Name	Test
Middle Name	---
Last Name	123
Date of Birth (DOB)	10/11/2021
Primary Phone Number	---
Email	tpimpo@itsolutionsgroup.com
Preferred Language	English

2

Home

Recent

Pinned

Apps

Dashboards

People

Monitoring Events

Households

Assessments

Notification - Contact Event not updated

Wake	Latha Putturu	A-0001647881	No
Wake	Latha Putturu	A-0001647884	No
Wake	Latha Putturu	A-0001647885	No
Wake	Latha Putturu	A-0001647886	No

3

Show Chart Activate Deactivate Delete Assign Share Email a Link Flow

Notification - Contact Event not updated

Wake	Latha Putturu	A-0001652921	No	10/26/2021	10/17/2021	As3410/12...	As3410/12...
Appalachian	# covid_arias	A-0001652913	No	10/25/2021	10/16/2021	Test	Test
Wake	Latha Putturu	A-0001652899	No	10/26/2021	10/17/2021	As3410/12...	As3410/12...

"Contact Updated?" is set to "No"

"Notification - Contact not updated" view

Note that the following are excluded from this view because these contacts should not be updated:

- If "Contact Updated?" reads "No" because the contact has opted in but not submitted any information.
- If "Contact Updated?" reads "No" AND "Reviewed & wrong person" (see box above) is set to "Yes."

Select event(s) and click "Flow"

Continued onto next page...

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Handling Incorrect Mismatches on Notifications

4. Choose **"Approve Contact Update."**
5. The first time you run this flow, you will receive a dialogue that asks you to connect to the Common Data Service. You can approve any prompts you may receive, and you will see a green check mark when you have been connected.
6. Click **"Run Flow,"** and you will receive a confirmation message. All submitted contact info will be transferred automatically, and you can click "Done."

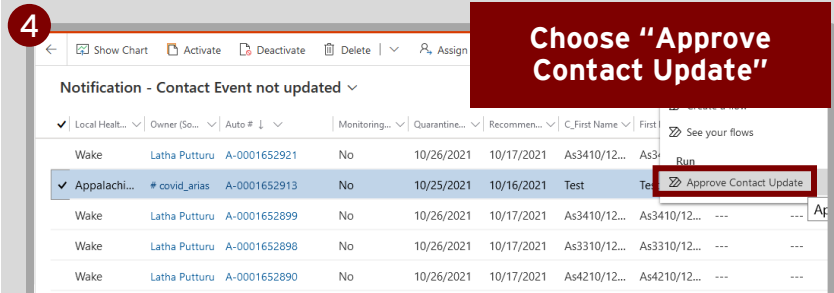
4 Choose "Approve Contact Update"

5 Approve prompts

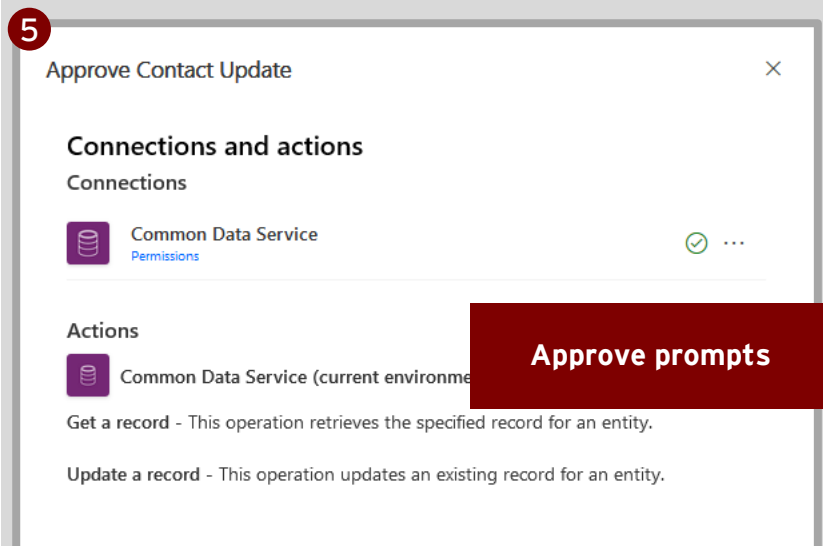
6 "Run Flow" and "Done"

CORRECT MULTIPLE MISMATCHES:

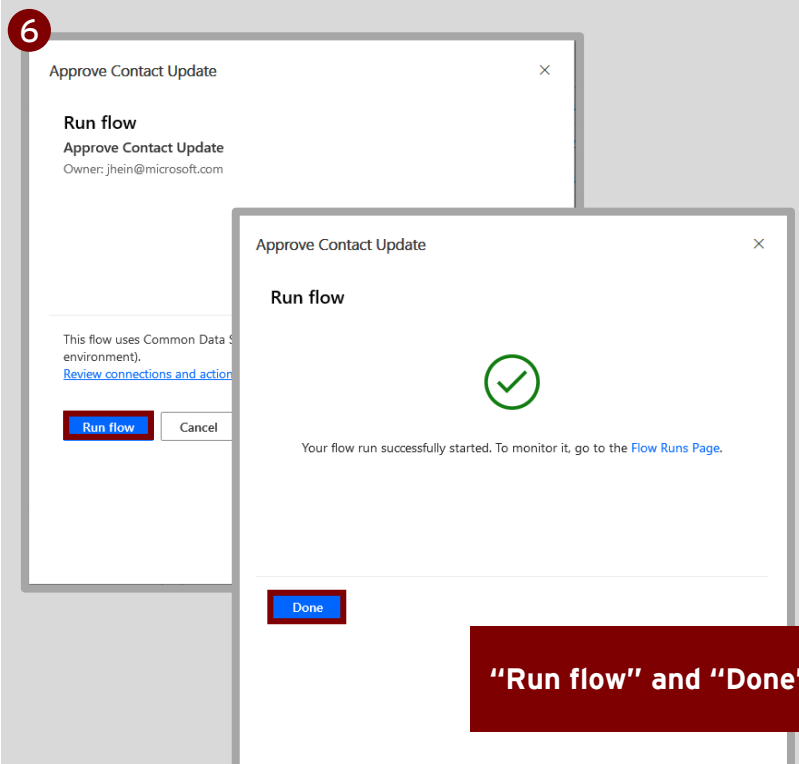
In addition to running this flow for one contact, you can also select multiple contacts in any assessment view and run the flow for several contacts at one time.



Choose "Approve Contact Update"



Approve prompts



"Run flow" and "Done"

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APPENDIX: Full text of email and text message notification - **PLEASE SEE THE DIGITAL OUTREACH SAMPLES DOC**

Actual links that contacts will receive to direct them to their unique landing pages (see [page 3](#)) and will appear in the *formats* shown below.

Public Health Notification Inbox x

NC Community Team 12:54 PM (0 minutes ago) ☆ ↶ ⋮

 to me ▾

Hello. This is the NC COVID Community Team.


You were recently exposed to COVID-19. To help slow the spread and protect yourself and your loved ones from the virus, you should quarantine (stay home and separate yourself from others) through 11/01/2021 and get tested on or after 10/23/2021.

Click this [DHHS.NC.GOV](https://dhhs.nc.gov) link for quarantine and testing resources to help protect yourself and those you love as well as to learn if you meet criteria for an exemption from quarantine or a shortened quarantine.

You can also call 844-628-7223 to speak directly with a NC COVID Community Team Member. You may receive a phone call from the NC COVID Community Team at the same number or directly from your Local Health Department. If you see these numbers, please answer the call!

NC COVID Community Team

12:50

<  45394 >

Today 12:45 PM

Adele, this is the NC COVID Community Team. You have been exposed to COVID-19. Quarantine through 11/01/2021 and get tested on or after 10/23/2021. You may meet criteria for an exemption from or a shortened quarantine. Call [844-628-7223](tel:844-628-7223) or visit <https://dhhs-covid19-ccto-uat-po.powerappsportals.us/en-US/notification/?id=4c2a47f6-fb30-ec11-b6e5-001dd804d0d6> for more info.